



# THE VIABILITY OF CENTRAL VIRGINIA'S MANUFACTURED HOUSING COMMUNITIES

Census + Housing Survey Findings

Field Research

Preliminary Assumptions

Photos



# STUDY AREA

Richmond Metropolitan Statistical Area

Data sources:

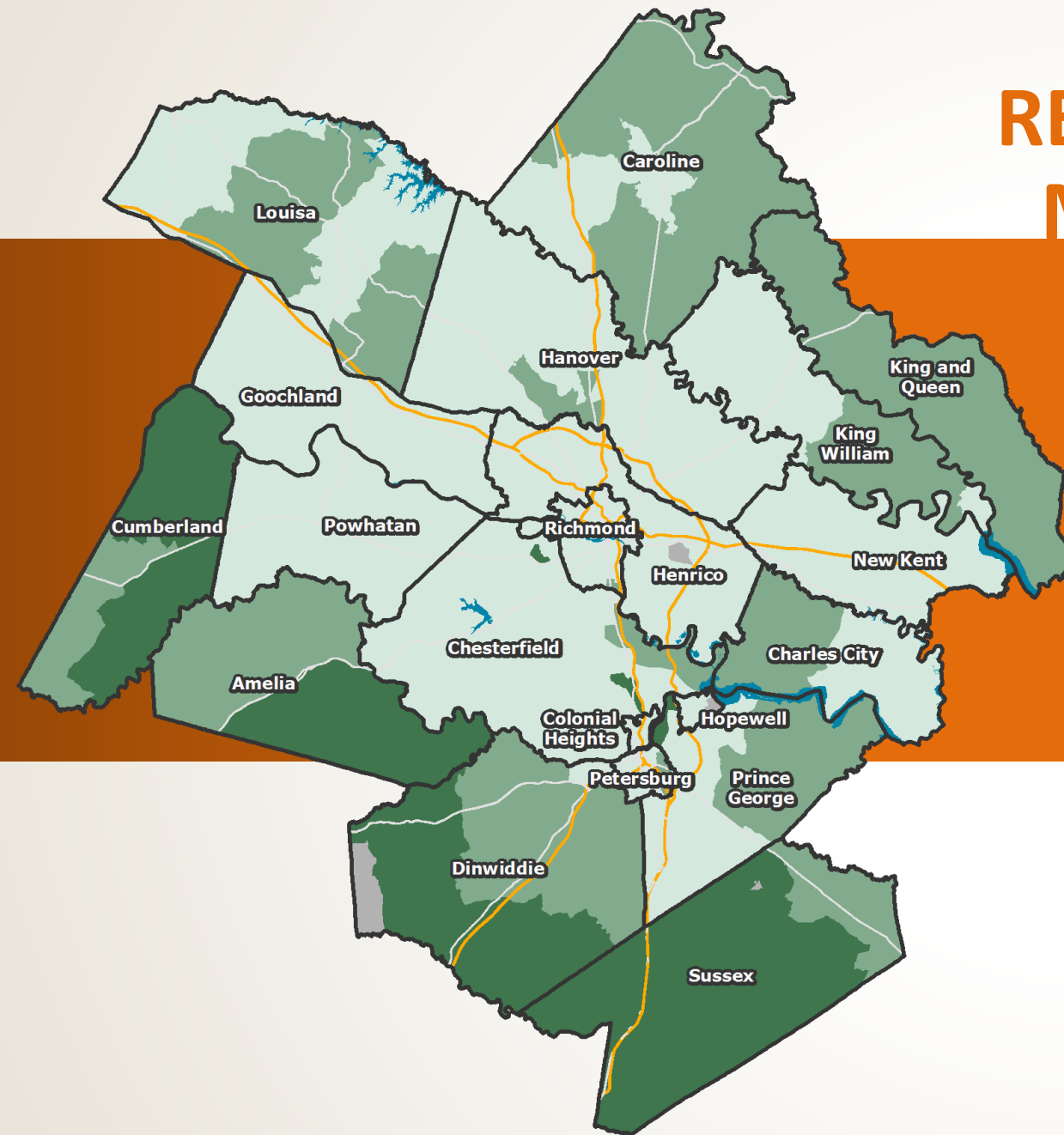
- ✓ 2013 American Housing Survey
- ✓ 2010-2014 American Community Survey
- ✓ 2010 Census



# RESEARCH APPROACH

- ✓ Disaggregated census data with MH home owners as group
- ✓ Windshield surveys of 54 parks
- ✓ Park management interviews
- ✓ Local government questionnaires
- ✓ Interviews with advocacy organizations
- ✓ Interviews with resident representatives
- ✓ Literature review of industry reports

# REGIONAL DISTRIBUTION OF MANUFACTURED HOUSING



## Pct. Manufactured Housing (By Tract)



Less than 10%



10% - 20%



Greater than 20%

**13,200** occupied MH units in Richmond MSA

**45,900** people living in MH in Richmond MSA

**4,735** units in **61** MH communities

**11,437** people living in MH communities



# **2013 AMERICAN HOUSING SURVEY**

**Data for all MH in Richmond MSA**



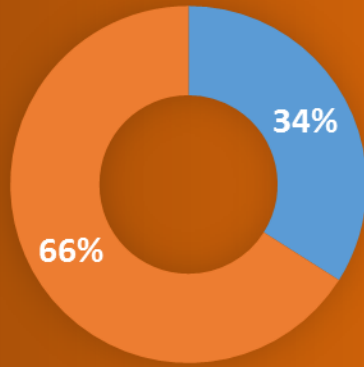
## PARK SIZE

**75%** of MH are singular or in groups of 6 or less

**21%** of MH are in groups over 20 units (i.e., parks)

# RESIDENTS

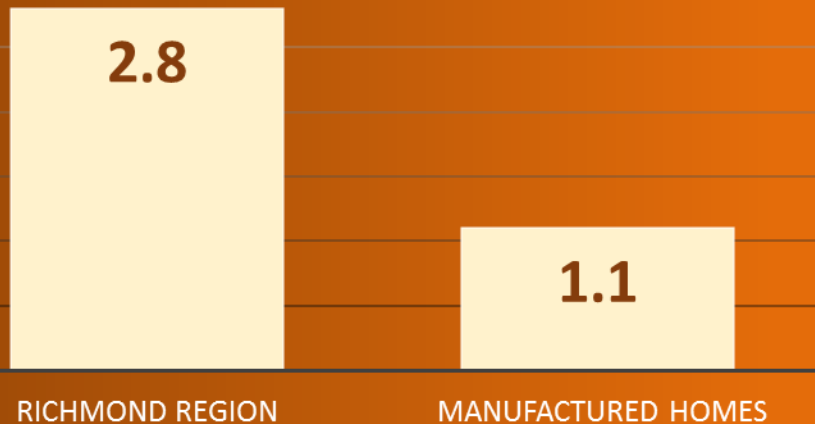
Homes with Persons 65 Years or Older



- ✓ 65% of MH have children under 18
- ✓ 66% of MH have senior citizens
- ✓ 68% of MH house multiple families

# VALUE TO INCOME

Median Home Value to Income Ratio

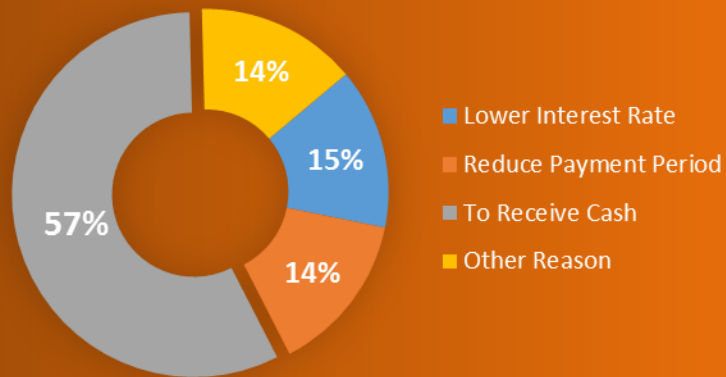


- ✓ The median value to income ratio is **39%** lower for Manufactured Home owners than for the region as a whole.
- ✓ **42%** of manufactured homes are valued at \$19,000 or less.



# REFINANCING MORTGAGES

Primary Reason For Refinancing Mortgage



- ✓ Over 20% of MH owners are paying more than 8% interest on mortgage\* loan
- ✓ Primary Reason for Refinancing Mortgage:

MH Owners: To Receive Cash: (57%)

Region: To Get a Lower Interest Rate: (60%)

*\* "Mortgage" may refer to other types of loans (i.e., personal property). AHS definition is unclear.*

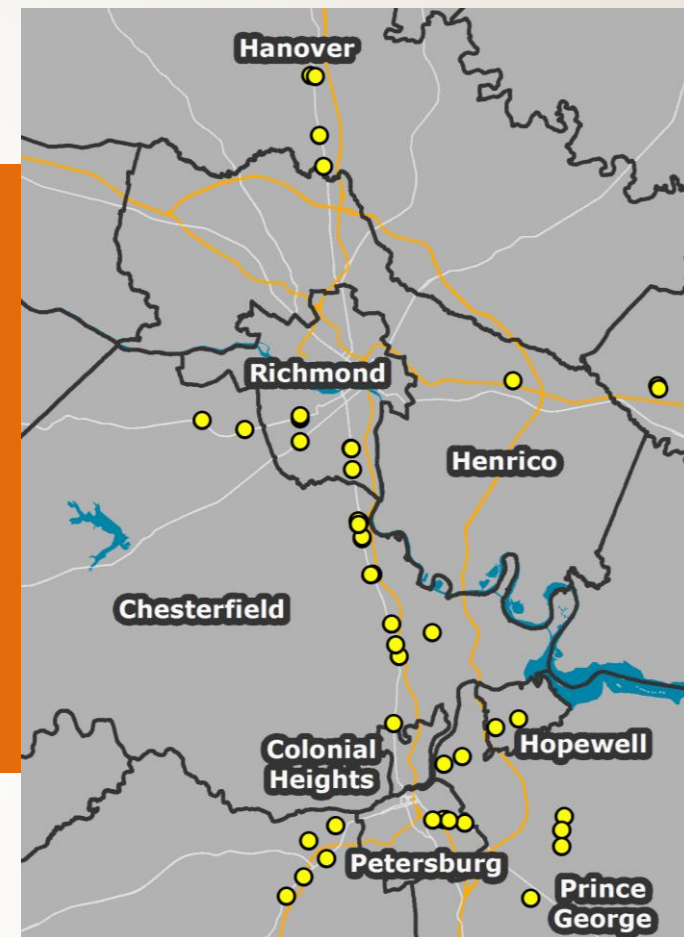
# **FIELD RESEARCH**

**MH park windshield surveys**

**May – July 2016**

# FIELD RESEARCH

- ✓ 54 parks examined
- ✓ Design Features
- ✓ Housing Conditions
- ✓ Park Services
- ✓ Connectivity



		LOUISA				CAROLINE
		Buckner MHP	Larry Lamb MHP	Mineral Trailer Park	Six-O-Five Village	Cedar Ridge
	# of Units	12	12	34	104	
DESIGN FEATURES	CODE					
Formal park entrance	0 = None, 1= Poor, 2 = Adequate, 3 = Good	0	1	3	2	
Curb, gutter, sewer	0 = None, 1= Poor, 2 = Adequate, 3 = Good	0	0	0	0	
Road/driveway condition	0 = None, 1= Poor, 2 = Adequate, 3 = Good	1	1	2	2	
Road/driveway width	0 = None, 1= Poor, 2 = Adequate, 3 = Good	1	1	0	1	
Sidewalk	0 = None, 1= Poor, 2 = Adequate, 3 = Good					0
Street trees	0 = None, 1= Poor, 2 = Adequate, 3 = Good					0
Dedicated resident parking	0 = None, 1= Poor, 2 = Adequate, 3 = Good					1
Street signs	0 = None, 1= Poor, 2 = Adequate, 3 = Good	0	0	0	1	
Speed limit signs	0 = None, 1= Poor, 2 = Adequate, 3 = Good	0	2	2	1	
Stop signs	0 = None, 1= Poor, 2 = Adequate, 3 = Good	0	0	0	0	
Other courtesy signs	0 = None, 1= Poor, 2 = Adequate, 3 = Good	0	0	0	0	
Fencing	0 = None, 1= Poor, 2 = Adequate, 3 = Good	0	0	0	0	
Street lighting	0 = None, 1= Poor, 2 = Adequate, 3 = Good	0	0	1	1	
Street layout		Loop	One dead-end street	Cul-de-sacs	Modified grid	M
DESIGN SCORE		2	7	13	9	
(Out of 39)		5%	18%	33%	23%	
median score	11					
HOUSING CONDITIONS						
Average age of units	0 = >30 years, 1= 10-30 years, 2 = <10 years	0	0	0	0	
Double-wide	0 = None, 1= Few, 2 = Some, 3 = Most	0	0	0	0	
Permanent foundations	0 = None, 1= Few, 2 = Some, 3 = Most	0	0	1	0	
Covered hitches	0 = None, 1= Few, 2 = Some, 3 = Most	1	2	2	1	
Foundation skirts	0 = None, 1= Few, 2 = Some, 3 = Most	3	3	3	3	
Large porches/decks	0 = None, 1= Few, 2 = Some, 3 = Most	1	1	1	0	
Screened-in porches	0 = None, 1= Few, 2 = Some, 3 = Most	0	0	0	0	
Lawn/landscape maintenance	0 = Poor, 1= Adequate, 2 = Good	0	1	0	0	





*Green Acres MHP, Dinwiddie County*

## DESIGN FEATURES

- ✓ 80% of parks have no curb, gutter, or sewer
- ✓ Only 2 parks have sidewalks
- ✓ 20% of parks have no public lighting
- ✓ 26% of parks have roads and/or driveways rated as “Poor”



*Tom Ford's, City of Richmond*

## HOUSING CONDITIONS

- ✓ 35% of parks display units with “Poor” exterior siding
- ✓ 9% of parks display uncontained refuse from street
- ✓ 15% of parks have some units with permanent foundations
- ✓ Nearly 50% of parks have a significant number of units that are pre 1976 HUD certified, or over 40 years old



*Sedgefield MHP, Hanover County*

## PARK SERVICES

- ✓ **87%** of parks do not have any recreational areas
- ✓ **Over half** of parks do not have on-site management office
- ✓ **80%** of parks have recreational facilities rated as “Poor,” or none at all
- ✓ **Over 50%** of parks have no fire hydrants





*Marsh Drive, Goochland County*

## CONNECTIVITY

- ✓ 65% of parks are located over ½ mile from a grocery store, or other meaningful retail.
- ✓ 74% of parks are located over ½ mile from a public transit stop.

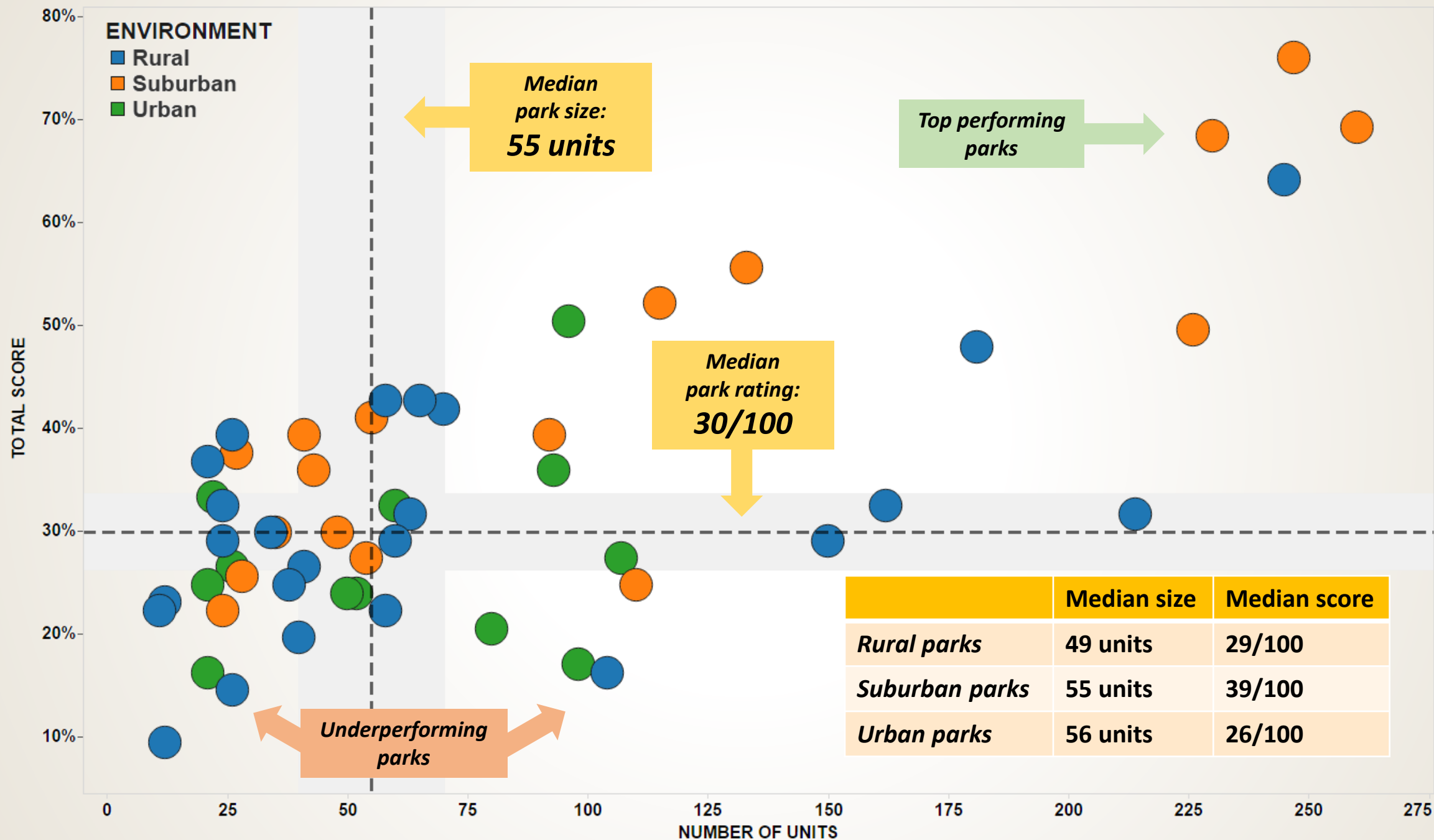




***El Rancho Trailer Court, Chesterfield County***

## PRELIMINARY CONCLUSIONS

- 1) Park size correlates positively with overall park quality. (*See next slide*)
- 2) Park “types” vary widely in the region.
- 3) Most MH are solitary, or in small groups.





***Ponderosa MHP, Chesterfield County***

## PRELIMINARY CONCLUSIONS

- 4) More than half of all MH in region are occupied by multiple generations or families.
- 5) Most MH parks are under-managed.
- 6) Local government policy varies.
- 7) Suburban parks are in better condition than rural or urban parks.



# PRELIMINARY PARK TYPOLOGIES



## 1) Top Performer

- ✓ amenity rich
- ✓ newer units
- ✓ good management





# PRELIMINARY PARK TYPOLOGIES

## 2) Traditional Suburban

- ✓ car dependent
- ✓ medium density
- ✓ large

# PRELIMINARY PARK TYPOLOGIES



## 3) Rural Enclave

- ✓ low density
- ✓ few units
- ✓ no management

# PRELIMINARY PARK TYPOLOGIES

## 4) Under Pressure

- ✓ Dense
- ✓ Poor conditions / code enforcement
- ✓ Many families
- ✓ Commercial corridors
- ✓ Redevelopment pressure





# PRELIMINARY PARK TYPOLOGIES

## 5) Obsolete

- ✓ declining population
- ✓ lack of infrastructure
- ✓ extreme poverty







# PRELIMINARY PARK TYPOLOGIES

## 6) Transitional

- ✓ mix of old & new homes
- ✓ active management
- ✓ presence of conventional suburban subdivision design



*Sunset MHP, City of Petersburg*

# RECOMMENDATION CATEGORIES

- 1) Financing
- 2) Management
- 3) Land use policy & code enforcement
- 4) Community planning
- 5) Design improvements

# **SURVEY EXAMPLES + PHOTOS**



Bellwood MHP, Chesterfield County







Bellwood MHP, Prince George County





Trinity MHP, Dinwiddie County





Bellwood, Chesterfield County





Palm Leaf Park, Hanover County





Conner Homes, Chesterfield County



# Top Performers

Sedgefield MHP, Hanover County







Sedgefield, Hanover County









Glen Meadows, Caroline County





Green Acres, Dinwiddie County





Colonial Estates, Hanover County





Forest Meadows, Henrico County





Harbor East, Chesterfield County





Pine Ridge, Prince George County









PINE RIDGE

*Welcome Home! You belong here!*









NO PETS  
ALLOWED  
IN  
PLAYGROUND  
AREA

WARNING





LOT  
61

PRIVATE PROPERTY  
NO TRESPASSING  
OR SOLICITING  
SPEED LIMIT  
10 m.p.h.  
RESIDENTS &  
GUESTS ONLY

NO  
THRU  
TRAFFIC



# Intermediate Performers



Woodford Estates, Caroline County





Kosmo Village, Hanover County





Rockahock Park, New Kent County





Ford's Park, Petersburg





Worsham Park, Richmond





Marsh Drive, Goochland County





Mineral Park, Louisa County





Tucker's Recreational Park,  
King and Queen County





220

Bexley Park, Prince George County



# Poor Performers



Trinity Park, Dinwiddie County





Fitzgerald Park, Richmond





Hale's Park, Hopewell





Six-0-Five Park, Louisa County





Sunset Park, Petersburg





Conner Park, Chesterfield County





Oak Shades, Prince George County





Putze's Park, New Kent County





Shady Hill, Chesterfield County





Rudd's Park, Richmond





Tidewater Park, Caroline County





Tidewater Park, Caroline County





Tidewater Park, Caroline County